

# Archived Information

## Interim Evaluation of the North Central Regional Educational Laboratory

### **I. Overview of Activities**

The North Central Regional Educational Laboratory (NCREL) evaluation visit took place at the Laboratory headquarters (Oak Brook, Illinois) from April 26-30, 1999. Prior to the visit, I reviewed the materials assigned to the team. As planned by the REL, the panel also made two site visits to local schools identified as examples of NCREL's signature works and held a teleconference with a subset of members of the Board.

### **II. Implementation and Management**

#### **A. To what extent is NCREL doing what they were approved to do during their first three contract years?**

##### **Strengths**

The site visit and review of the Laboratory Operations materials Signature Works, and other products suggests that NCREL has been successful in conducting activities that meet the requirements of their contract, modifications, and annual updates. Inspection of Annual reports and FY 99 Update supports the REL's ability to produce deliverables as also outlined in their contract, modification, and annual updates. Timelines appear to be generally adhered to and the REL seems to be on a trajectory that would allow them to complete their planned scope of work during this contract period. For example, the activities summarized in the 1<sup>st</sup> Quarter Report of FY '99 clearly go beyond the expected accomplishments outlined in the "Activities Planned for the Next Quarter" in the 4<sup>th</sup> Quarter Report of FY '98.

NCREL has done a commendable job leveraging funds and staff to support the scope of work as reported in their report of total funding as of November 1998. Monies from a variety of other federal, state, and local funding sources (DOE Math and Science Grant, DOE NCRTEC Grant) and contracts (e.g., Department of Defense, Chicago Public Schools) complement OERI funding and contribute to a cohesive stream of work. The allocation of funding and personnel to signature works appears in accordance with the REL's priorities and regional needs (NCREL presentation during previsit briefing).

As outlined in NCREL's 1995 proposal the Lab appears to have a well-established system of strategic alliances with bodies such as regional CSSOs, state governors and legislatures, and advisory networks (e.g., National Rural Education Association and Urban Education Network). NCREL should be commended for their recent partnering with institutions of higher learning around integration of their Learning with Technology course in the preparation of preservice teachers as described during our site visit. The strength of their networks and strategic alliances was supported by the Board of Directors during our teleconference, many of whom represent these partnerships, and are well-documented in the REL materials (e.g., Board of Director meetings).

### **Challenges**

The teacher voice on the Board of Directors could be stronger. It is unclear how the Teacher Advisory Board identified in the Response to Technical Questions interfaces with the Board of Directors. In addition, the Board of Directors appears to have a rather uncritical stance toward the REL. While this may be an indication of the Lab's health, it was surprising to hear during our teleconference that Board members felt that there are no problems with the Lab scaling up their work given that the Lab has identified the challenges in this work. In addition,

Lab personnel has also identified in our conversations during the site visit the disconnect between their work with state trainers and their ability to deliver the training to teachers.

Given the ready availability of ERIC on the internet, I may question the need for the Resource Center to be involved in ERIC searches. Having a link to ERIC from the NCREL site may be a way to facilitate teacher inquiry and self-study.

Given that projects cut across centers, it would seem important to have very well-established systems of communication. For example, the theme of engaged learning was identified in the presentation of the Technology Center has one of the most powerful “big ideas” to emerge from their work. Yet, when staff from Schools and Community were asked about the indicators of engaged learning, they were unable to respond.

### **Recommendations**

1. Issues of scaling up should be an issue the Board of Directors helps NCREL think about. It would seem advisable to also have the teacher advisory board directly linked to the Board of Directors.
2. NCREL is aware of the importance of communication between staff and Centers, particularly as the organization has grown from 20 to 120 individuals. To its credit, the Lab has taken some very specific steps to promote effective communication and guard against the “silo” phenomenon often associated with “center” organization. For example, as outlined in their presentation on Wed., April 28 the Lab has cross-appointment of individuals as well as all staff meetings, and brown bag lunches. As the Lab grows, the need for better means of communication is paramount. The systems for cross-communication at present seem to be rather “ad hoc” and dependent upon projects. As NCREL expands and adjusts to new leadership, it may be an opportune time to take stock of how NCREL can be strengthened as a learning community.
3. Using existing links on the Web such as ERIC should be explored to increase the capacity of teachers to do their own research. As on-line text of journal articles become available, these links should also be made.

**B. To what extent is the REL using a self-monitoring process to plan and adapt activities in response to feedback and customer needs?**

**Strengths**

QA procedures are well-documented in the NCREL Quality Assurance and Evaluation document provided for the panel's review. In this document the REL has identified the criteria and procedures for both external and internal reviews of products or written materials, including web sites (3/18/99 Quality Assurance for Web sites documents). To be considered high quality, an NCREL product must:

1. effectively meet an identified need
2. have a clearly defined purpose and audience a feasible dissemination and implementation plan
3. be delivered in a format and presented in a style that is useful to clients
4. represent the best available knowledge drawn from research and practice
5. adhere to high standards for useful, ethical, valid and reliable inquiry applied research and evaluation studies
6. promote balanced and positive portrayals of diversity in the use of photos, graphics, and textual components, and other components
7. conform to NCREL's editorial and technical standards for print, audio, video, and multimedia

Quality of products is also reviewed by clients via response cards included with all NCREL products. In addition, as part of the overall REL Performance Indicator process, NCREL surveyed its clients around issues of satisfaction of key products and services<sup>1</sup> (March 1999 document). Overall, 86.8 percent of clients rated the quality of the product/service as

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<sup>1</sup> Key products and services include: Learning with Technology; Making Good Choices: Comprehensive School Reform; New Leaders for Tomorrow; Charters in Midstream: School Development Program; Safe Passage for Adolescents in a Risky Society; New Leaders: Comprehensive School Reform; and Changing by Design.

excellent or good. An estimated 87.3 percent rated the quality of planning of the product/service as excellent or good; 89.4 percent rated the timeliness of the product/service as excellent or good. Among clients, 86.8 percent rated the quality of the presentation of the product/service as excellent or good.

As outlined in this document, NCREL prepares quality assurance reports outlining an updated list of all research and development products and publications at least annually to OERI. For each item on the list it includes a brief description of the product, its intended audience, the approximate date of publication, and the approximate number of copies to be delivered.

NCREL has in place procedures for self-assessment and to utilize results to improve performance as outlined in the above referenced document. Internal evaluation includes both formative and summative processes that focus on the merit and worth of all NCREL processes, programs, products, and services. As described in the Fourth Quarter Progress Report, NCREL undertook an Annual Portfolio Review in October 1998 that allowed Board members to review the Lab's entire portfolio of products and services. The Board evaluated the work of NCREL focusing on three overarching evaluation questions: (1) Is NCREL doing the right work?, (2) Is NCREL doing the work it said it was?, and (3) Is NCREL doing its work well? According to the Fourth Quarter report, the Board rated highly the work of all centers, especially the quality of the work, the way centers targeted important needs, and the balance of products aimed at key audiences. The Board identified seven areas they considered NCREL's most important work:

1. Identifying research-based practices and getting these best practices into classrooms and hands of teachers
2. Providing access to and disseminating research-based information, especially electronically
3. Supporting policy making

4. Creating school and community linkages
5. Producing curriculum development materials
6. Integrating technology into education
7. Supporting data-driven decision making

NCREL seeks external/independent critiques, incorporating feedback into performance.

As outlined in the NCREL Quality Assurance and Evaluation Document, external feedback is solicited from a variety of sources: through partnerships with R&D organizations, regional feedback from key client groups, regional surveys of educators, surveys of ED-funded agencies. Two Gallup surveys of stratified random samples of educators throughout the region were conducted- one in 1995 and the most recent one in 1999. The Lab uses the responses from these surveys to identify regional educational needs and priorities, knowledge of educational service providers and networks at the federal, state, intermediate and local levels, the kinds of services needed, use of and satisfaction with information, products, and services provided, how information from each provider has been used or applied, and the effects of such use or application on education improvement or reform initiatives in schools, school districts, and states (Quality and Evaluation Document).

### **Challenges**

Teachers we interviewed in focus groups were not able to describe a process for providing feedback to NCREL on an on-going basis, particularly around technical assistance that is in process.

### **Recommendations**

Clarify process by which teachers are able to provide timely feedback to NCREL staff.

### **III. Quality**

#### **A. To what extent is NCREL developing high quality products and services?**

##### **Strengths**

As described in the section on Quality Assurance, NCREL has well-established internal and external processes for developing high quality products and services that contribute to a coherent and sustained program of work as witnessed in signature works as well as other products reviewed on site. Products and services are developed based on credible bodies, although at times not comprehensive (see comments in section below), of previous research and strive to translate that theory to practice in field-based settings throughout their stream of work. For example, in the *Every Child Can Succeed* program with CPS, the literature on literacy and language acquisition of children speaking English as a second language is at the fundamental and is skillfully woven into the design of the implementation. Much to their credit, NCREL has used this research to build teacher knowledge and understanding of language and literacy acquisition that is a key piece of professional development with school teaching staff.

Most of the products and services I reviewed were of high quality, although some variation was noted. Products such as *Plugging-In* and *Gateway Concepts* appeared to be of exceptionally high quality and utility. All of the teachers and administrators we spoke to on our site visits attested to the high quality of NCREL products and services, particularly products. As one administrator put it, “If something comes with an NCREL return address, I always open it up. I know it will be good.” On the other hand, a tool such as *Making Good Choices* appeared to have some limitations in terms of its implementation, from my estimation. A statement such as: “How effective is your school’s curriculum?” seems straightforward but is actually at the heart of systemic reform. The tool may be a wonderful springboard for professional

development and rich conversation among school faculty and administration. I am not sure that it can be used that easily to make good choices about models of comprehensive school reform.

### **Challenges**

In reviewing the literature base for implementation of Every Child Can Succeed, I failed to see reflected important findings from seminal works in literacy that extend beyond those important domains described in the previous section. For example, the 1998 NCR publication *Preventing Early Reading Difficulties* emphasizes the need for an end to the “reading wars” and a polarization of approaches. Young children need a balanced program. The findings on phonemic awareness and the need for systematic and sequential opportunities for students to work with alphabetic principles to develop grapho-phonemic, as well as semantic and syntactic cueing strategies, are not included in works cited. This is particularly of concern when working with K-3 schools. Moreover, while I think the STRP has strength as a program for improving reading, I do not believe it is a balanced program for young readers, K-3, and see its use in those grades as an area of concern.

After examining documentation of site work associated with the signature work on school reform and NCREL’s response to panel questions on 28 April 1999, I wonder about the quality of the design for the documentation and evaluation of the intensive site work. I heard that EPIC is looking over notes from the site work, but it isn’t clear to me that the design for evaluation has been built in as a key component of the work in order to scale up. What is the level of implementation of the various interventions? Especially if multiple interventions are being introduced, it is critical that the fidelity of treatment be monitored in order to understand potential student outcomes. (And as we know, we can’t fix by analysis what was botched in the design!)



## **Recommendations**

1. While STRP is a program that I would potentially recommend for grades 3 and above, I would strongly encourage NCREL to revisit their decision to broker a program such as Strategic Teaching and Reading to K-3 schools, as is (I understand that the on-line version of STRP that is being developed will include a primary reading component as well as a high school component). A balanced program must for early reading instruction must be more inclusive than the scope of this program. If K-3 schools are schools NCREL wants to work with in terms of literacy, then I would recommend brokering programs and professional development that include the following components (taken from NRC recommendations for grades 1-3).

- Beginning readers need explicit instruction and practice that lead to an appreciation that spoken words are made up of smaller units of sounds, familiarity with spelling-sound correspondences and common spelling conventions and their use in identifying printed words, "sight" recognition of frequent words, and independent reading, including reading aloud.
- Fluency should be promoted through practice with a wide variety of well-written and engaging texts at the child's own comfortable reading level.
- Children who have started to read independently, typically second graders and above, should be encouraged to sound out and confirm the identities of visually unfamiliar words they encounter in the course of reading meaningful texts, recognizing words primarily through attention to their letter-sound relationships. Although context and pictures can be used as a tool to monitor word recognition, children should not be taught to use them to substitute for information provided by the letters in the word.
- Because the ability to obtain meaning from print depends so strongly on the development of word recognition accuracy and reading fluency, both of the latter should be regularly assessed in the classroom, permitting timely and effective instructional response when difficulty or delay is apparent.
- Beginning in the earliest grades, instruction should promote comprehension by actively building linguistic and conceptual knowledge in a rich variety of domains, as well as through direct instruction about comprehension strategies such as summarizing the main idea, predicting events and outcomes of upcoming text, drawing inferences, and monitoring for coherence and misunderstandings. This instruction can take place while adults read to students or when students read themselves.
- Once children learn some letters, they should be encouraged to write them, to use them to begin writing words or parts of words, and to use words to begin writing sentences. Instruction should be designed with the understanding that the use of invented spelling is not in conflict with teaching correct spelling.

Beginning writing with invented spelling can be helpful for developing understanding of the identity and segmentation of speech sounds and sound-spelling relationships. Conventionally correct spelling should be developed through focused instruction and practice. Primary-grade children should be expected to spell previously studied words and spelling patterns correctly in their final writing products. Writing should take place regularly and frequently to encourage children to become more comfortable and familiar with it.

- Throughout the early grades, time, materials, and resources should be provided with two goals: (a) to support daily independent reading of texts selected to be of particular interest for the individual student, and beneath the individual student's frustration level, in order to consolidate the student's capacity for independent reading and (b) to support daily assisted or supported reading and rereading of texts that are slightly more difficult in wording or in linguistic, rhetorical, or conceptual structure in order to promote advances in the student's capabilities.
  - Throughout the early grades, schools should promote independent reading outside school by such means as daily at-home reading assignments and expectations, summer reading lists, encouraging parent involvement, and by working with community groups, including public librarians, who share this goal.
2. I would also encourage NCREL focus their professional development in literacy to address issues of: assessment, differentiated instruction, and evaluation of materials.
  3. Rigorous designs for documenting and evaluating all intensive site work so that core sets of processes for school change may be understood and developed for scaling up .

#### **IV. Utility**

- A. To what extent are the products and services provided by NCREL useful to, and used by customers?**

##### **Strengths**

In the 1995 Gallup Survey of a random sample of educators in the NCREL region, respondents were asked to rate the usefulness of services and products received from NCREL. A little less than half (45 percent) rated violence and substance abuse prevention and early

childhood (45 percent) as very useful. Other areas rated as very useful include professional development (32 percent), curriculum (37 percent), and assessment (33 percent).

### **Challenges**

NCREL staff spoke about the challenges associated with the movement of products from the LAB to the field. They can point to specific cases where the product was introduced to a region through an state education agency and “took off.” NCREL specifically pointed to *Learning with Technology* and their experience with the state of Ohio. They also pointed to other states or districts that had undergone the same training, but bore “no fruit.” An even greater challenge is the issue of fidelity. Again, this is an issue with which the Lab wrestles and has tried to maintain some control of the fidelity through the trainer of trainer model.

### **Recommendations**

As the Lab ponders issues of scaling up, the issues of utility, fidelity, and sustainability naturally arise. Are clients using the products? How are using the products? Will they continue to use the products when NCREL is no longer involved? I think the lessons learned from the Training of Trainers model in *Learning with Technology* are important. True, NCREL wants to get products out the door. But, unless the products are tied to structures with teachers have close affinity and some basis for shared investment in improving schools, the products probably remain underutilized. NCREL has many strategic partnerships with solid track records that are clearly focused on reform. I would encourage NCREL to capitalize on and exploit those relationships (e.g., urban systemic alliance; rural systemic) and to be “selectively strategic” in their dissemination efforts.

**B. To what extent is the NCREL focused on customer needs?**

**Strengths**

In working with schools and teachers, NCREL places a clear emphasis on establishing need for their product or service. To this end, NCREL has developed an issues scanning system (Panel Presentation, April 28, 1999; Issue Scanning Development Document, December 16, 1998) that surveys needs in the field from a variety of sources, including: internal system, Resource Center requests, web-site hits, requests for proposals in the field, and specific requests for services.

**Challenges**

I am including this as an area that needs improvement, although I believe NCREL is aware of the tension between responding to requests for services (cost) and benefits. Given the historical mode in which the Lab's been asked to operate, without priorities focused on putting the pieces together and scaling up, this tension may exist for some time. For example, upon passage of the Obey-Porter Bill, Wisconsin wanted a Models Fair. NCREL responded, invested considerable time and money, and found the results to be quite disappointing.

**Recommendations**

I believe NCREL works very hard to be responsive to the needs of its constituencies. There needs to on-going "soul-searching" within the organization about the costs and benefits associated with responding to the many requests for services and products they receive. Clearly, NCREL must be responsive, but it must also be strategic.

#### **IV. Outcomes and Impact**

##### **A. To what extent is NCREL's work contributing to improved student success, particularly in intensive implementation sites?**

###### **Strengths**

NCREL, based on OERI priorities, is very much engaged in “putting the pieces together” in a multitude of settings throughout their region. To this end the Lab has developed a clear 4-stage model of school change that guides their systemic work: (1) Setting goals and assessing gaps; (2) Designing and evaluating an action plan; (3) Implementing and maintaining change; and (4) Evaluating and reviewing efforts. Through Lab presentations, documents (Design for School Improvement 4/2/7/99), and Signature Work 2, NCREL has described how they form partnerships with schools and the formidable work of supporting schools as they wrestle with challenges such as: scoring below norms on standardized tests; cultural and linguistic diversity in urban, high need, high poverty areas; inadequate teacher preparation at the preservice level; inadequate or lack of professional development; and lack of congruence between programs available in schools and students' needs. In order to improve teacher practice and ultimately, student learning and achievement, NCREL brings a variety of resources to these reform efforts, including: expertise in a variety of areas, technology resources, a capacity to identify effective programs and to broker programs; and a portfolio of productive products.

While student outcomes (learning and achievement) are the ultimate (or distal) outcomes, it is often also helpful within the context of school reform to consider proximal outcomes: change associated with the practice of teachers and administrators. We heard from teachers and administrators that work with NCREL has changed how teachers teach and how instructional leaders do their job. At one school, the principal has become an instructional leader and is visiting classes. She herself credits NCREL for showing her that she is the instructional leader.

Teachers talked about the benefits of the professional development they are receiving and how teaching *Everyday Math* has transformed their instruction in mathematics.

At another school, both the teachers and principal enthusiastically described how their work with NCREL has helped teachers reflect on instructional practices and collaboration. Teachers are designing units that engage kids in inquiry and exploration of a topic to develop deep understanding of key concepts. Teachers are rethinking curriculum and asking students to take an active role in their own learning. One administrator from the district spoke very positively and forcefully about NCREL's influence on his thinking and the district's stance toward engaged learning and technology- impressive.

As part of the overall REL Performance Indicator process, NCREL surveyed its clients around issues of the impact of key products and services on their instructional practice<sup>2</sup> (March 1999 document). Overall, 73.5 percent of respondents said that the product/service increased their awareness of important new skills and knowledge, 53.1 percent reported that they used the product/service to inform decision making and planning, and 49.8 percent said that they used the product/service to change or enhance the quality of professional practices.

The impact of NCREL's work in terms of student, or distal, outcomes is emerging. Achievement data supports positive change in student achievement in six of eleven Chicago Public Schools with whom NCREL worked (1997-98). Other student outcomes are noted anecdotally by teachers in areas such as student engagement in learning and improvement in student attitude toward learning.

NCREL is beginning to contract with a third party evaluator to investigate student learning change and student achievement associated with their *Learning with Technology*

*Course.*

### **Challenges**

The panel wondered about the unevenness of technology integrated into various intensive sites. If NCREL's specialty area is technology, should it be integrated into the work across sites? When asked about this, NCREL staff replied that they felt it less needed since they had staff on-site. This however, seems to beg the question. If technology is a powerful learning tool (which I believe it is) and NCREL has considerable expertise in this area, shouldn't it be a "value added" for children in schools working with the Lab?

NCREL is working, to their credit, with many dimensions of schools needing reform. In that vein, NCREL has done a great amount of work with administrators in one school. From our conversations with teachers, it would appear that this work is far from done. Teachers talked about being monitored to make sure that they were doing "what they were supposed to be doing" but not being mentored. Within the area of impact of student learning, the Lab must be able to demonstrate this on a wider scale. I was disappointed to read that on a survey (March 1999) of clients perceptions of the impact of key services/products on student learning, only 22.9 percent of respondents said that the service/product positively affected student performance.

### **Recommendations**

1. Reevaluation of the integration of technology into services provided schools.
2. Design of professional development services and products around the mentoring process for administrators seems to be paramount.
3. Third-party evaluation of student achievement in sites where NCREL has made significant contributions to reform.

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<sup>2</sup> Key products and services include: Learning with Technology; Making Good Choices: Comprehensive School Reform; New Leaders for Tomorrow; Charters in Midstream: School Development Program; Safe Passage for Adolescents in a Risky Society; New Leaders: Comprehensive School Reform; and Changing by Design.

**B. To what extent does the Laboratory assist states and localities to implement comprehensive school improvement strategies?**

**Strengths**

In their region, NCREL has been asked by their constituencies to play a major role in comprehensive school reform. The Center for Scale Up in conjunction with other centers at the Lab responded to the first request from Wisconsin upon passage of the Obey-Porter Bill and worked with localities to obtain CSRD funds.

NCREL worked with the state of Illinois to try and develop a set of recommendations to address the following problems: (1) a drop in reading scores while math scores remained fair and consistent, (2) identification of the characteristics and the quality and consistency of reading program; and (3) extent to which instruction, curriculum, and reading assessment is aligned. As a result of this project, NCREL developed a core set of processes to guide districts and states in monitoring and changing a reading program.

On the awareness side: hundreds of thousands of copies of print products are disseminated. Pathways “hits” are up 25 percent from last year. Increased reach of professional development- e.g., Learning with Technology – course (focus group, presentation April 26,). Trainer of trainers model. Has its problems, but is a way to scale up. Pre-, post-test assessment show that teachers gain knowledge. The teacher dialogue on Learning Safari indicate that teachers are thinking about their teaching in a different way.

**Challenges**

How to scale up and go beyond an awareness. This is the big question with which NCREL is confronted. There are many barriers to the fulfillment of their mission to scale up. First, this is a new priority in the OERI and RFP and is what the REL’s must research. The



research base on how to scale up isn't there—the Labs have the opportunity to create the research base.

Beyond this, various obstacles in rolling out services on a larger scale have also been identified by NCREL and their constituents with whom the panel interviewed. NCREL staff spoke about the difficulties working with intermediate state agencies in disseminating training to their teachers. In the case of Learning with Technology, the intent was to train these intermediaries to be the trainer of trainers. Unfortunately, a significant portion of those trained have not gone on to do subsequent trainings.

Both NCREL and one of our interviewees spoke about how teachers and schools like to put their own fingerprint on work—"if it isn't homegrown, they don't want it." This speaks to a systemic issue throughout the American education system. As one NCREL staff member put it, "How do you scale up when school districts are their own province?"

### **Recommendations for School Improvement**

1. As NCREL is well aware, the "lessons learned" from intensive sites have to be used to inform the work on scale up. Therefore, a major recommendation focuses on the need to make the link between the intensive work and scale up. While the intensive work does respond to needs from the field, I believe that those doing have the intensive work have already learned some important lessons. One, often where a school or outside agency think the need is, isn't really where the need is. As in Senge's model of organizational change, where we think we need to "tweak" the system is often not the starting point. In their work with CPS NCREL learned that in order to address achievement in reading and mathematics, often other systemic issues also have to be addressed (e.g., supervision of staff; professional development; home-school relationships; classroom management; school climate). In approaching their work, I would encourage NCREL to develop procedures for evaluating these other systems prior to accepting contracts.
2. While NCREL can bring programs developed by other developers to sites, I believe that they need to characterize their involvement with these sites, if they are to truly learn from them, as more than brokerage. Brokering coaches may be effective, it was difficult to assess this from our brief time on site. Clearly, this, also requires a great deal of coordination and questions whether a "brokering" approach will be able to answer the larger, questions about systemic reform.

**C. To what extent has NCREL made progress in establishing a regional and national reputation in its specialty area?**

**Strengths**

NCREL has a national name in technology and I believe, sets a high standard for its products and services related to technology. It has very high visibility within its region, at least among administrators. An estimated 80 percent of district superintendents and 67 percent of principals in NCREL's region have heard of NCREL (Gallup Survey, 1995). Moreover, from interviews with NCREL staff members most identify *Pathways* and *Plugging-In* as two of the products most widely used by teachers and most visibly bear the thumbprint of NCREL.

**Challenges**

NCREL has far less name recognition for teachers. Based on the results of the 1995 Gallup Survey of a random sample in the region, only 21 percent of teachers said they had heard of NCREL. The panel also heard from interviews on-site that there is some tendency for states not contiguous to NCREL to feel somewhat marginalized.

**Recommendations**

NCREL appears to work very hard to gain visibility. As the use of technology increases in schools, I am optimistic that NCREL's visibility will increase as well.

**VI. Overall Evaluation of Total Laboratory Programs, Products and Services.**

At the first the Lab's first presentation to the Review Panel on April 26<sup>th</sup>, NCREL was described by its Executive Director as an "adolescent lab." It is thirteen years and has grown into an organization with 120 staff members and 16 million dollar annual budget. My overall evaluation of total laboratory programs, products, and services is that is an extremely hard-working, creative, and capable organization that it is generally healthy and quite productive. As

in any organization, however, the question must be asked, is the organization able to leverage its human resources to the maximum? In terms of products and services, the Lab produces some outstanding work and some that deserves some careful reassessment in order to potentially improve quality, impact, sustainability, and potential for scale-up.

## **VII. Broad Summary of Strengths, Challenges, and Recommendations**

### **Strengths**

Based on my review of materials and site visit, NCREL has clear strengths:

1. As I alluded to in the above section, NCREL is an organization that appears to be able to attract the “best and brightest” of individuals. Each and every staff member I spoke with was articulate, enthusiastic, and very committed to their work at NCREL. In fact, the present and “pending” executive directors very clearly identified the staff as a major resource of the organization. This is no minor accomplishment and I think NCREL and its leadership should be congratulated.
2. The work NCREL has taken on is very exciting, but fraught with pitfalls and obstacles. Nevertheless, the staff do not shy away from taking on challenges associated with reform in underperforming, traditionally underserved, diverse communities – both urban and rural. Again, the work that the Lab is doing is important. Their commitment is high and they bring an enormous amount of expertise in a wide variety of areas to the table.
3. NCREL has built an impressive reputation among leaders at both the state and district both as a school reform agent, and a leader in technology. They have forged strong partnerships with external reform agencies and leverage monies very effectively from a variety of sources to supplement the OERI contract to build a cohesive and sustained stream of work. Their links with schools of education in the region and the inroads they have made into preservice teacher preparation are exciting.
4. NCREL appears to work very hard to respond to its constituencies and regional needs.
5. The products and services NCREL produces are of generally high quality. I especially want to identify one product that I thought were stellar: Gateway Concepts. This product is based on empirical evidence of need. It is standards-based. It is user friendly and is incredibly generative in terms of where a teacher can take it. It is clearly a vehicle for professional development that supports engaged learning in classrooms. Very impressive!

6. I also want to recognize *Learning with Technology* for its contributions to teacher professional development in technology, yes, but also for its power in reshaping teachers' thinking about their practice. The message in the program is that technology is a tool to engage students in learning. I found it fascinating that teachers begin to really "get it"- what problem-based learning is- when they use a tool that is a natural facilitator!

### **Challenges and Recommendations**

1. Intensive sites are wonderful opportunities for developing understandings of how change occurs. On the other hand, they can be incredibly labor, resource-intensive sites that bear very few results that can be used to scale up or to develop procedural knowledge about change. I believe that there is a danger for coaches and those working closely with the schools to become immersed in the technical assistance aspects of the work and have little time for the documentation, evaluation, and reflection that is critical. This is more of a caution than a deficiency.

#### **Recommendation**

- In providing direct service to schools and districts to help them "put the pieces together" it is imperative that NCREL develop clear systems for documenting the implementation, impact, and change process within classrooms as well as schools. Level of implementation, amount of time teachers spend teaching, and other contextual factors must be documented and analyzed. This requires tools and processes for data collection that is labor-intensive, but necessary, in order to understand the conditions and barriers to school change.
2. The quality of some of the products and services brokered- at least in one site- raises issues about the brokering process for me. Many programs are not available for brokerage and I found myself wondering what happens when NCREL doesn't have a good program that "fits?" How good does the fit have to be? I am not sure schools are always in the best position to decide—even using tools such as making good choices—requires a great deal of facilitation. Again, these are cautions about issues that made me uncomfortable during the site visit.

#### **Recommendation**

Careful consideration must be paid to the match between brokered programs/services and the classroom/school context. If a program is brokered as an "add on" to the

existing curriculum, then additional questions around how to “put the pieces together” must be raised. If a program meets a “slice” of the school’s overall need in an area (e.g., reading comprehension), how will the other components be addressed (word identification, fluency)? More attention to developmental trends in an area must be used to guide brokerage.

3. The thorny issue of scale up is clearly one that, as the executive director noted, doesn’t have a clear research base and no one really knows how to do it. NCREL can make a tremendous contribution to this literature and to the systemic school reform movement in this area. After spending several days on site, I am wondering if the “collective wisdom” of the organization isn’t being exploited to the degree it could be in regard to scale up. From the outset I have questioned why NCREL chose to create a center called “Scale Up” rather than have that function embedded within other structures. I think the Lab is making efforts to ensure connection between centers, but I question if the current organizational structure contributes to the understanding of this issue.

### **Recommendations**

Revisit the organizational structure of the Lab. The 4-phases of implementing projects require major interdepartmental efforts; NCREL itself has described how different departments interface around one project. What I heard from the presentations, however, was a process by which centers and departments became involved in projects in a sequential manner. For example, the Center for Teaching, Learning, and Curriculum may develop products to be then implemented by the Center for School and Community Development. Next, the Center for Scale Up becomes involved in the process of rolling out the product/service. Last, EPIC evaluates. As one contemplates bringing services and products to scale, it would seem critical that evaluation be ongoing and that this linear sequence may not harness the collective brain power of the organization. As a panelist I would not presume to

prescribe an organizational framework, but I do recommend a fresh look at how NCREL operates as a learning community.